Process Maps: Your Road to Efficiency

ia health link

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What is a process map?

A process map is a structural analysis used to show how work is currently being done and to plan how it should be done. This graphic representation allows an observer to see and fully evaluate an entire process.

Why create a process map?

This tool helps you:

- Document the activities for your process in its entirety.
- Compare the current process with desired performance.
- Highlight steps that don't add value.
- Identify where changes need to be made.
- Gain a better understanding of assumptions, issues and communication needs.

How to create a process map

1. **Scope the process.**
   Clearly define a starting and stopping point.

2. **Identify important metrics to assess.**
   Examples include:
   - Business (cycle time, cost).
   - Process flow (efficiency).
   - Quality (defects, complaints).

3. **Meet with stakeholders and others involved.**
   Determine needed frequency of meetings.

4. **Draw your process.**
   - Start with high levels.
   - Add in sub processes and details later.

5. **Validate your process map.**
   - Evaluate logical flow.
   - Adjust accordingly.
   - Finalize and gain approval from stakeholders.

Tips and tricks

- A process map is typically read from **left to right** and top to bottom, using a series of simple, standard shapes.
- An **activity** is typically indicated by a rectangular box.
- A **flow** is indicated by an arrow.
- A **decision** is indicated by a diamond.
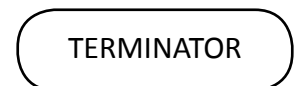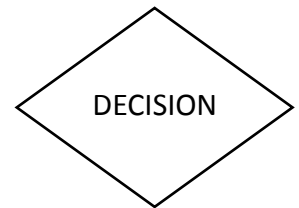- Options for a decision are written on the **lines** exiting the diamond.

- Don't have Microsoft Visio? You're not out of luck!
  - Have **Microsoft Word, Excel** or **PowerPoint**? Insert these symbols from the AutoShapes menu.
  - Have an **Apple** product? Get these symbols using **Apple Pages** software.
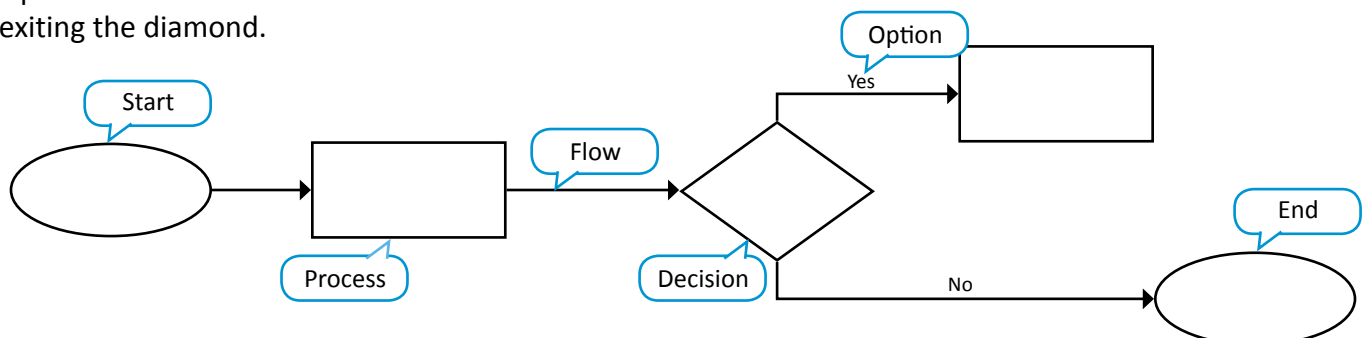
Turn your process...

- ▭ **Patient** arrives at practice.
- ▭ **Front desk** requests contact information.

- ◇ **Front desk:** Are the patient records in the system?
  - No:
  - ⬓ **Patient** completes check-in forms.
  - ▭ **Patient** waits for nurse in waiting room.
  - Yes:
- ◇ **Front desk:** Is the patient record current?
  - Yes:
  - ▭ **Patient** waits for nurse in waiting room.
  - No:
  - ⬓ **Patient** updates forms.
  - **Patient** waits for nurse in waiting room.

- ▭ **Nurse** escorts patient to exam room.

- ▱ **Nurse** takes vitals, social history and complaints and reviews records for preventive care.

- ◇ **Nurse:** Is provider available?
  - Yes:
  - ▭ **Provider** conducts visit by addressing questions and concerns.
  - No:
  - ▭ **Patient** waits and is seen when provider becomes available.

- ◇ **Provider:** Does patient need a prescription?
  - Yes:
  - ⬓ **Provider** writes prescription.
  - ▭ **Patient** walks to front desk.
  - No:
  - ▭ **Patient** walks to front desk.

- ◇ **Front desk:** Does patient need a follow-up visit?
  - No:
  - ⬭ **Front desk** completes checkout process. End of flow.
  - Yes:
- ◇ **Front desk:** Is patient ready to schedule?
  - No:
  - ▭ **Front desk** provides patient with office contact information.
  - ⬭ **Front desk** completes checkout process. End of flow.
  - Yes:
  - ▭ **Front desk** schedules follow-up appointment.
  - ⬭ **Front desk** completes checkout process. End of flow.

Mapping symbols to consider

- ▭ ACTIVITY
- ▱ DATA
- ⬓ DOCUMENT
- ◇ DECISION
- ⬭ TERMINATOR
- → CONNECTOR

…Into a map!

Patient arrives at practice → Front desk requests contact information → **Does the patient exist in system? (FD)**

- No → Patient fills out forms
- Yes ↓

Is the patient record current? (FD)

- No → Patient updates forms
- Yes ↓

Patient goes to waiting room

Is a nurse available?

- No → Patient goes to waiting room
- Yes ↓

Nurse escorts patient to exam room

↓

Nurse takes vitals and discusses history

↓

Is provider available?

- No → Patient waits for provider
- Yes ↓

Provider conducts patient visit, discussing patient concerns and questions

↓

Does patient need prescription? (P)

- Yes → Provider writes prescription
- No ↓

Patient walks to front desk

↓

Is a follow-up visit needed? (FD)

- No → Front desk checks out patient and thanks him/her
- Yes ↓

Is patient ready to schedule follow-up visit now?

- Yes → Front desk schedules follow-up appointment → Front desk provides appointment reminder card and completes checkout
- No → Front desk provides patient with contact information for office and completes checkout